



# BEST PRACTICES IN EXECUTIVE COACHING

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As a former CHRO and corporate officer who often hired executive coaches to develop leaders in Fortune 500 companies; and as an executive coach myself and CEO/Managing Partner of a global executive coaching firm for the last 15 years, I know of few professions that can be more beneficial yet are more misunderstood or misapplied than executive coaching. If you are considering engaging an executive coach for yourself or for others, we respectfully offer a few recommendations based on our learnings.

At this point we should probably distinguish between ‘coaching’ and ‘mentoring’ – two terms that are often misunderstood and conflated. In our view, mentoring is instructing and training someone who is less experienced. It is characterized by sharing experiences and understanding the mentor has but that the mentee does not. Coaching, on the other hand, uses what the client may already know but for some reason may undervalue, misapply, or just not exhibit. A mentor teaches an apprentice welder how to weld; a coach teaches an experienced welder how to weld better. This is a subtle but important difference.

Simply put, an executive coach’s role is to help executives be more effective so that they can deliver better results. To do so, the executive coach engages the whole person, which often involves discussions and coaching on many different aspects of the executive’s life that can impact the executive’s effectiveness. However, it’s important to remember that the core objective of the engagement is improving the executive’s effectiveness. So, let’s get started.

## Optimizing Investments in Executive Coaching

There are several factors to consider in a potential executive coaching engagement, but in our experience a few factors are particularly critical. We will elaborate on each, but they essentially fall into two buckets:

1. The executive coach’s experience, skills and capabilities.
2. The engagement process.



## Coach Qualifications

Let's begin with a basic question: if you wanted to improve your golf game, would you hire a coach who never swung a golf club or played the game of golf? Of course, you wouldn't. Albeit a biased opinion, we believe coaches with business experience are simply more effective. Coaches who have worked in a business environment, perhaps even at the executive level, are just more likely to be able to help executives become better executives and better leaders. Business experience helps the coach understand the challenges their clients face, and this understanding enables the coach to optimize their approach to address the client's specific needs and meet the client-company's expectations.

While some aspects of executive development, for example, emotional intelligence, don't necessarily require a coach with business experience, such experience does provide insight which can be invaluable in helping a client understand the impact of their low EQ in their business environment. Just as no one ever got into better shape by reading a book on exercise, executive development requires the proper application of the right techniques to achieve and sustain gains; and progress can be greatly accelerated when guided by an experienced coach.

### Coach Qualifications: Training

Some coaches have been through rigorous coach training, often including an 'apprenticeship' supervised by an accredited coach. Others hold advanced degrees in behavioral sciences and may have specialized training in coaching techniques. All such credentials are highly beneficial. We do advise caution however in considering coaches who have only completed a short training course. While they may be well-intended, a coaching 'certification' from a two-day program is a weak qualification to coach anyone at any level.

### Coach Qualifications: Skills and Tools

Many coaches bring a wealth of knowledge, tools and skills to each coaching relationship. They ask powerful questions that provoke new thinking and challenge old paradigms. They can provide feedback, be an unbiased sounding board, provide good advice, and they can offer specific knowledge to support the leader's development. We recommend seeking out coaches with a deep 'toolbox' and a broad skillset. Such coaches won't over rely on a simple set of tools, outdated techniques and/or a one-size-fits-all approach. As the saying goes, if all I have is a hammer, everything looks like a nail.



We also advise caution regarding self-proclaimed ‘experts’ in specific aspects of executive development. In our experience, those who self-declare their expertise, usually do so because no one else will. Regrettably, the ‘wild, wild west’ of executive coaching has its share of proverbial ‘snake-oil’ salespeople who don’t possess the experience or the credentials to facilitate executive leadership development.

In extreme cases, some have plagiarized or otherwise stolen intellectual property to take an unethical short-cut to market credibility. The bottom-line is, consumers of executive coaching services need to carefully vet potential coaches before making their selection. We recommend speaking with client references, validating credentials, probing beyond the slick marketing materials and website. The selection of a coach is a critically important decision that requires careful and thorough due diligence, don’t leave it to chance.

## Executive Coaching vs. ‘Life’ Coaching

As we mentioned, executive coaching involves coaching the whole person. A wide range of issues in the executive’s personal and professional life can have a profound impact on their effectiveness. However, a well-qualified executive coach does not allow the coaching discussion to drift, or at least not for long, to topics unrelated to their core objective: executive effectiveness. The coach will always bring the client back to their core objectives. If an issue is identified which is beyond the coach’s qualifications to address, and which is severely impacting the executive’s ability to perform, the coach’s professional obligation is to facilitate a connection with an appropriate professional.

Executive coaches who drift too far into marital counseling, helping a client navigate a divorce, deal with problematic children, personal health or nutrition advice, are at best failing to provide the proper support, at worse are guilty of malpractice. To be sure, life’s challenges can significantly affect an executive’s effectiveness, and while an executive coach can achieve collateral benefits by helping the executive overcome many of these challenges, this is not the coach’s core purpose. The success of the coaching engagement should always be determined by the improvement in the effectiveness of the leader as measured by their ability to deliver business results.



## The Value of an Integrated Process

Even though they are usually paying the bill, client-companies are often blissfully unaware of how their coaching dollars are being spent. An executive coach's role is to assist the executive in a wide variety of areas including but not limited to:

- ✓ Achieving shared objectives while avoiding self-deception;
- ✓ Building and nurturing strong professional relationships;
- ✓ Collaborating effectively;
- ✓ Enabling the success of others;
- ✓ Facilitating innovation and successfully navigating change;
- ✓ Upholding accountabilities; and
- ✓ Being decisive when corrective action is necessary.

While there are several executive coaching models that are effective, to illustrate the value of a robust process, we offer our ***Integrated Executive Development Process*** model as an example.



In our work as executive coaches, we begin engagements with an orientation and alignment session. The purpose of this meeting is, in part, to dispel false paradigms regarding executive coaching. In addition, we begin to align the client with his or her company's / sponsor's expectations. We clarify confidentiality rules, and we determine an optimal approach for the client's specific needs.

A note about 'sponsorship': we have found that it is an important element of the coaching engagement that can help ensure alignment between the client, the client-company, and the coach, while still preserving confidentiality. Most often, the sponsor is the client's direct manager, or in the case of a CEO, a member of the board of directors. If the direct manager is not suitable for some reason, a trusted senior colleague can be substituted. The sponsor ensures the client-company is engaged in the process, approves and monitors progress toward achieving the coaching objectives, and validates the company's commitment to the executive's development. While the content of the coaching discussions is always held in strict confidence, the sponsor is entitled to know that the client is engaged and working toward achievement of the approved coaching objectives.

In **Step 2**, we conduct appropriate assessments (e.g. 360 feedback, psychometric profiles, etc.), review the results with the client, and then distill the results into 3 to 5 coaching objectives. The assessment provides a foundation for establishing 'SMART' coaching objectives (goals that are specific, measurable, actionable, relevant, and time-based). In the absence of such objectives, the coaching engagement can lose focus and become little more than a discussion of recent issues or events rather than a systemic process intended to drive measurable and sustainable improvement. Once formalized, the coaching objectives are reviewed with the sponsor, again to ensure alignment, and once approved, finalized.

**Step 3** is the core of the coaching process – it is when the coaching regimen is established. In the coaching sessions, the coach and the executive discuss progress toward achieving the coaching objectives; they explore alternative approaches and tactics; and they work together to unearth and resolve barriers to progress. The coach challenges ineffective or counter-productive behaviors and they provide 'homework' assignments in which the executive can experiment with and eventually adopt new understanding and skills. It is in these exchanges that the business and leadership experience of the coach is perhaps most important. At the risk of over-extending the analogy: "loosen your grip, bend your knees, keep your head down, slow your backswing, eye on the ball... now swing." With that experience, the coach can lead the executive to approaches that are effective and which will yield the desired outcome. While some guidance is of course intuitively obvious, in our view many of the more powerful breakthroughs require business experience - they require a coach who understands what works and doesn't work in the executive's world.

While each client is unique, and client experiences vary, on average, this is what can be expected during Step 3:



In the first few months we further orient the client to the coaching relationship and process. The client learns how to maximize the process for their and the organization's benefit. As this phase progresses, trust between the coach and the client is built and nurtured. Clients often report they begin to think and act differently in this phase, although changes are not always visible to others.



- After the first few months, coaching at this stage is more natural and less cumbersome because the coaching processes have become familiar and trust is well-established. Professional growth and development are typically more intense during this period.
- As the engagement progresses, deeper issues that can be more difficult to detect and unpack become apparent to the coach and the client. Coaching can intensify at this stage, clients often report a significant amount of growth and behavior change.

In **Step 4** we conduct alignment meetings with the client and their sponsor to ensure we are making progress toward achieving the coaching objectives. This alignment process can vary based on specific client and/or company preferences, however, the confidentiality of the coach/client relationship is always strictly maintained throughout.

For some clients, a natural completion point becomes clear as they close-in on their objectives. However, some clients may require and desire more time. The client and the sponsor are in the best position to determine if the client's developmental progress is adequate. The coaching process should conclude once it is clear the objectives have been or will soon be achieved. While some clients are understandably anxious about so-called 'open-ended' engagements, we advise against pre-determined timeframes. Achievement of the coaching objectives should be the determining factor, not the duration of the engagement.

Lastly, in **Step 5** we engage the sponsor and the client in establishing new expectations for the client's effectiveness post-coaching. We strongly recommend periodic progress assessments which often include updated 360 feedback from the leader's key respondents. Establishing a robust follow-up rigor will serve to confirm the process, identify opportunities for additional training, coaching and/or mentoring, and will help to sustain the gains that have been achieved. The client-company has made a significant investment in the leader; Step 5 helps reinforce with the client that a new level of effectiveness is expected going forward.

In our experience, executive coaching is a very powerful tool that can accelerate the development of high-potential talent; help a capable executive overcome derailing behaviors, and it can provide invaluable guidance to those at career inflection points such as 'first-timers' (e.g. first-time CEO's, COO's, GMs, functional leaders, etc.). However, we again must also advise caution: executive coaching is not a cure-all. A lack of basic skills, competence, or adequate management experience are not coachable challenges; nor are psychological disorders. However, under the right circumstances, given a leader who is ready, willing and able to change; a coach who has the requisite experience, skills and credentials; and with a properly structured engagement, the executive's overall 'game' is highly likely to improve thereby enabling even greater leadership and organizational performance.



In summary, we offer the following 'rules of thumb' to optimize your coaching engagements:

1. Whenever possible, select executive coaches who have business experience;
2. For 'C'- Suite engagements, coaches with executive experience are preferable;
3. Always verify the executive coach's credentials;
4. Select executive coaches who possess a broad spectrum of skills and tools;
5. Employ a rigorous, goal-centered, integrated coaching engagement management process.

**We wish you much success in your coaching journey.**

